

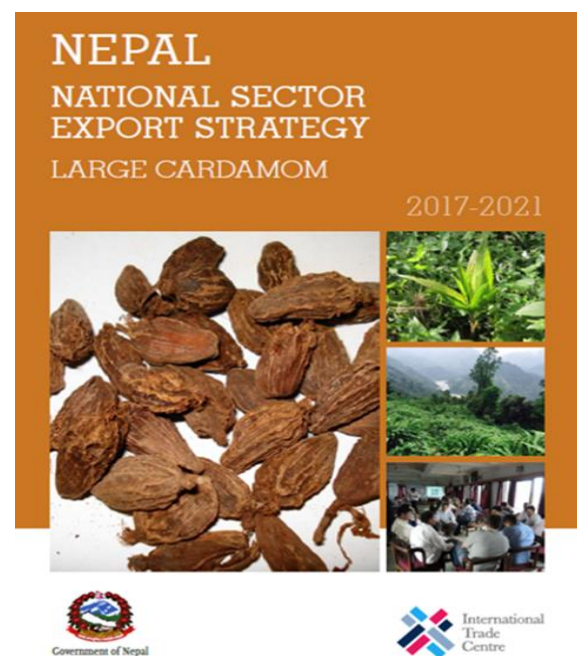
Status of and issues in large cardamom and possible ways to distinguish it as a special product

Surendra Joshi

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Importance of large cardamom

- Mountain niche product - low volume, high value, and non-perishable
- Comparative advantage - '*kholsako sun*' – traditionally grown in areas not conducive to produce other crops
- Important cash crop – provisioning services of ES in KL
- Priority crop – to reduce trade deficit, generate revenue: NTIS, OGOP, TSP



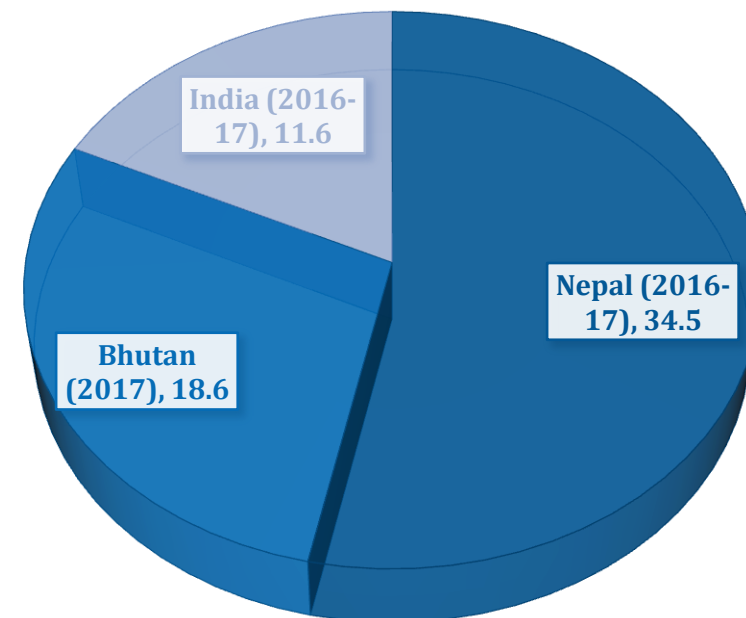
Status and market trends

- In the global trade of MAPs, large cardamom is a very small component – (4%)
- Total production (12,500 MT) spread between Nepal (51%), India (38%), and Bhutan (11%)
- India is the largest consumer (green and large black cardamom)



Trade of MAPS (source: ITC Trade Map)

Earning from export of large cardamom
(US\$ in million)



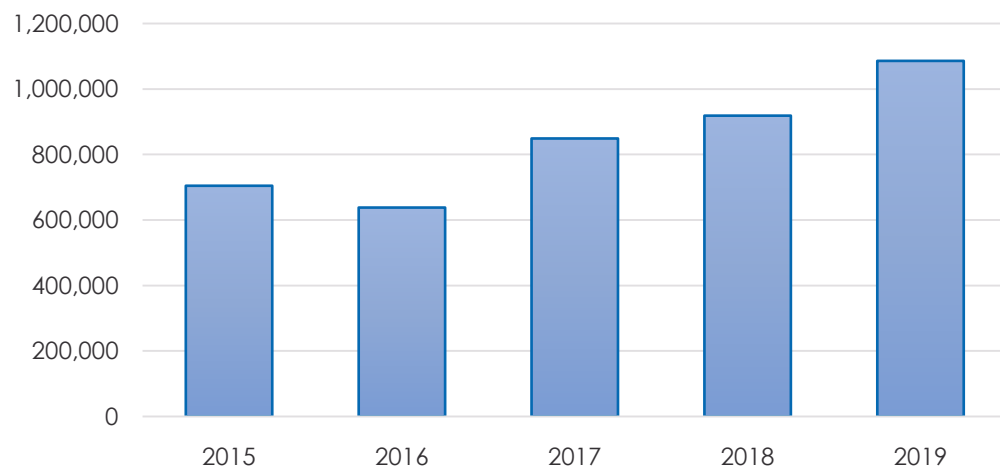
Status and market trends

Lack **specific data on large cardamom** - clubbed with other cardamoms in international trade (HS Code)

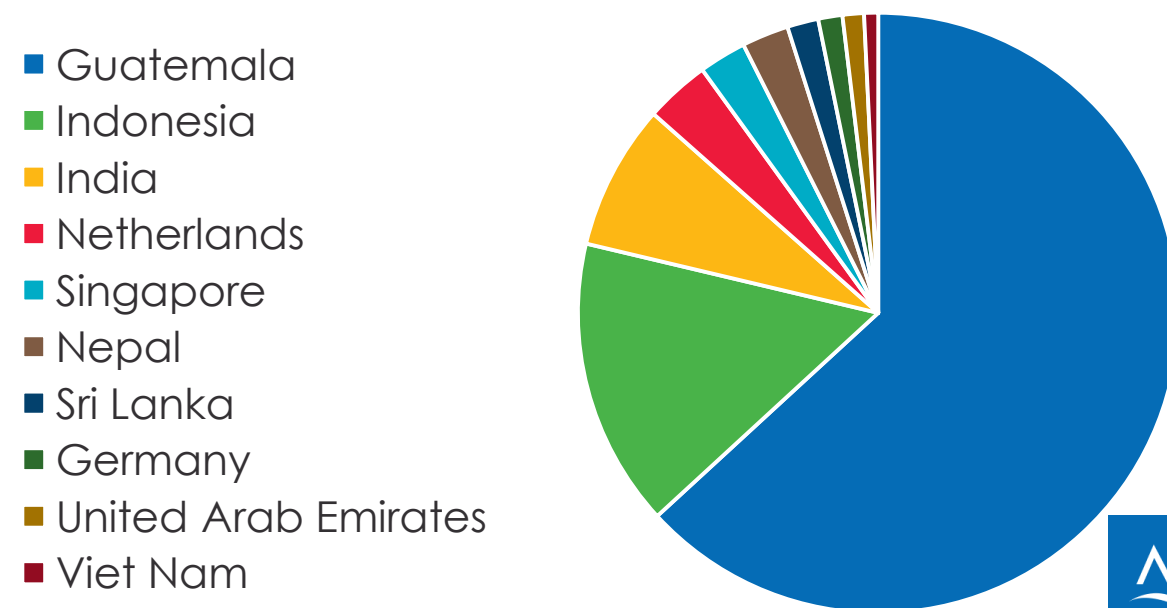
Share of large cardamom in international trade is declining

India accounted for 65% of world production in early 1970s, when Guatemala contributed 21.5% - now it is reverse

World's exported value of
cardamom, nutmeg and mace (x1000
USD)



Share of export value by countries in 2019

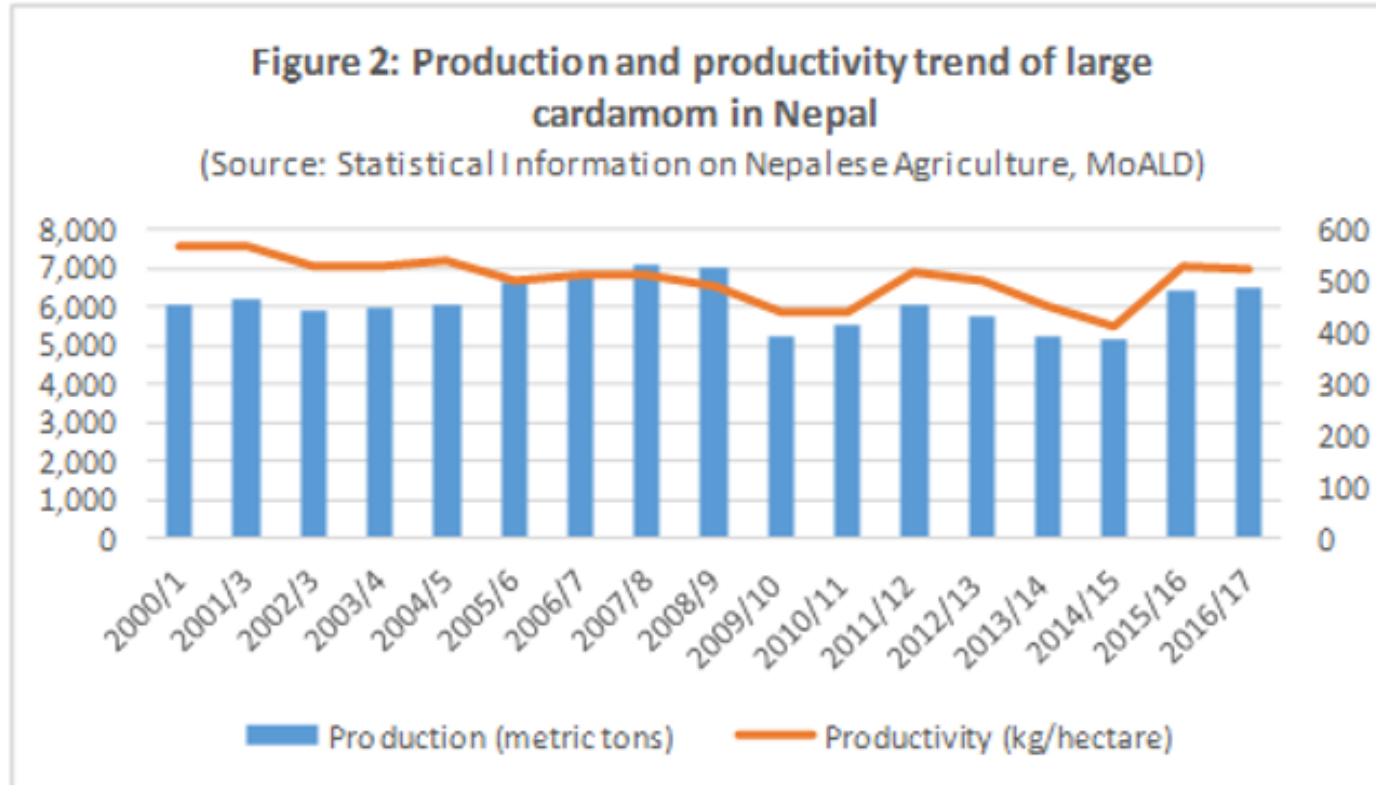


Key issues

Emerging competition
with other countries
(Guatemala, Indonesia)



Key issues



Production fluctuation

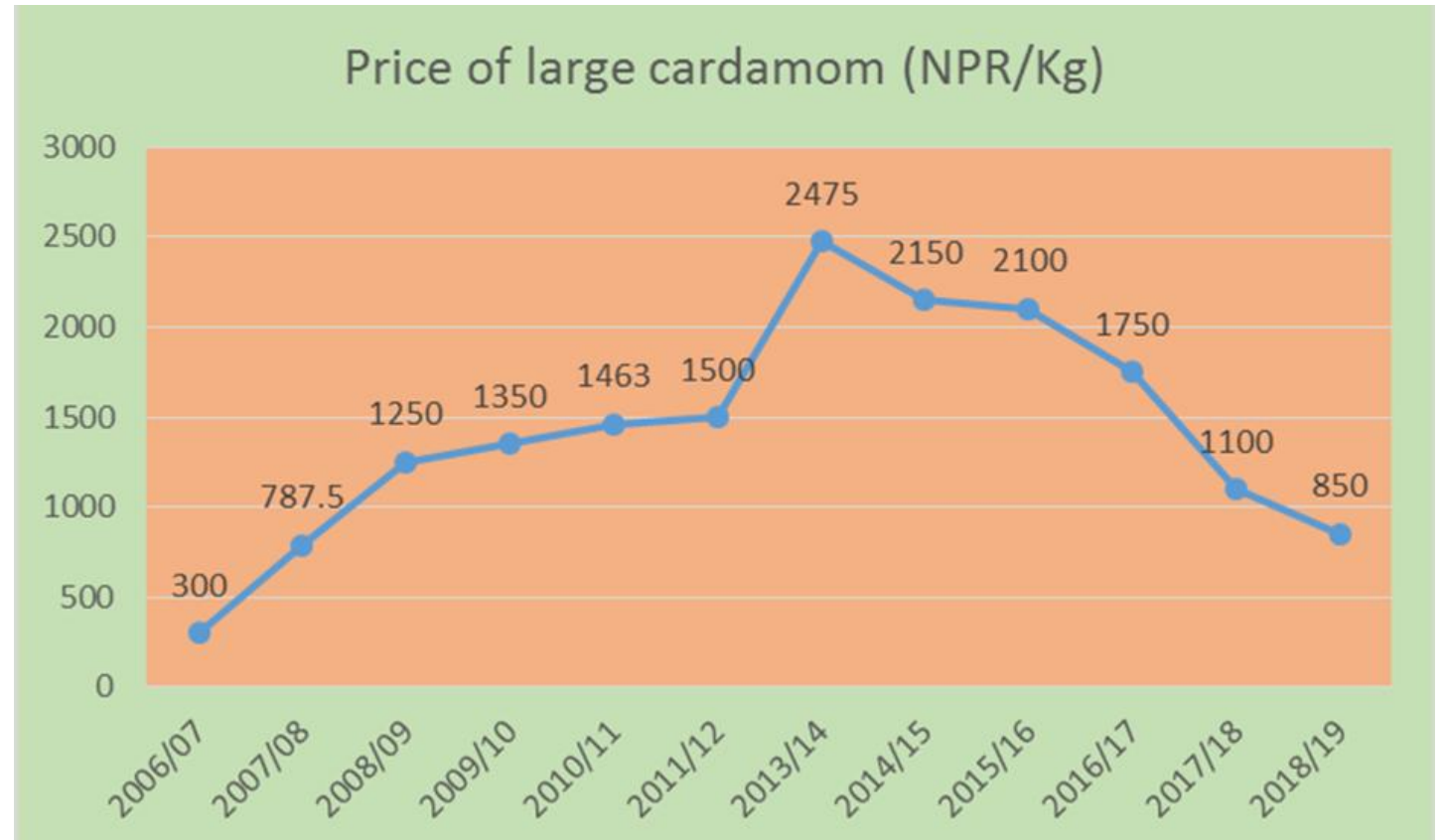
Increase in crop vulnerability to disease and climate change

Key issues

Price variability

Weak market linkages

No value addition at local level



Regional collaboration

Imperative to create a common message to inform consumers about unique attributes



Regional workshop in May 2019 highlighted the need for positioning large black cardamom as a distinct product to counter **competition with substitute products**



Transfer of knowledge and technology to improve competitiveness and reduce cost of production, processing and product delivery

Harnessing comparative advantages

HS Code	Citrus	HS Code	Tea	HS Code	Cardamom
08	Fruits and Nuts, edibles	09	Coffee, tea, mate and species	09	Coffee, tea, mate and species
08.05	Citrus fruit; fresh or dried	09.02	Tea	09.08	Nutmeg, mace and cardamoms
08.05.50	Fruit, edible; lemons (Citrus limon, Citrus limonum), limes (Citrus aurantifolia, Citrus latifolia), fresh or dried	09.02.10	Tea, green; (not fermented), in immediate packings of a content not exceeding 3kg	09.08.31 09.08.32 09.08.33	Large black cardamoms, neither crushed nor ground Large black cardamoms, crushed or ground Green cardamom crushed and ground

- Create distinct identity, as large black cardamom is different from green & white cardamom – need a separate HS Code (UN Trade Stat Div)
- Identify its specific attributes, uses and demand pattern
- Inform end customers with coherent message

Today's webinar

Focuses on positioning large cardamom as a unique product



Can we build a multi-country (Himalayan brand) identity, GI certification and common standards for the large cardamom - to counter the emerging competition from the green and white cardamoms?



What might be the mechanism of such an arrangement to make it effective?



What is our basis?

Large cardamom is a micro-climate specific crop, native to Eastern Himalaya, grown only in three countries

Accumulation of some unique compounds – origin from mountain environment, type/texture of soil, vegetation

Free of pesticides residues and chemicals

Encouraging consumption trends – people look for authentic, niche products supported by GI



两种豆蔻 (<i>Amomum subulatum</i> , <i>Elettaria cardamomum</i>) 的挥发油成分比较			
compound	Structure	<i>Amomum subulatum</i> Flavour Fragr. J., Vol. 13, 349-352 (1998)	<i>Elettaria cardamomum</i> Food Anal. Methods (2014) 7:1745–1754
α -Thujene		0.3	—
α -Pinene		3.8	8.11
Camphene		0.1	0.44
β -Pinene		8.9	1.52
Myrcene		1.2	—
<i>p</i> -Cymene		0.1	—
1,8-Cineole		61.3	4.25



ICIMOD efforts to promote large cardamom

Understanding issues and challenges in large cardamom, including climate change and market risks

Co-development of solution package – climate resilient practices

Value added products from pods and fibres

Expand income portfolios – diversified livelihoods

Exploring opportunities in non-conventional markets



Thank you

Protect the pulse

